



MONTANA LEGISLATIVE BRANCH

Legislative Fiscal Division

Room 110 Capitol Building * P.O. Box 201711 * Helena, MT 59620-1711 * (406) 444-2986 * FAX (406) 444-3036

Legislative Fiscal Analyst
CLAYTON SCHENCK

DATE: September 23, 2004

TO: Legislative Finance Committee

FROM: Taryn Purdy

RE: Legislative Training

The purpose of this memo is to provide an opportunity for Legislative Finance Committee feedback on proposed legislator training by the Legislative Fiscal Division.

PROPOSED TRAINING

For the 2003 session, we had proposed the following three tiers of training. Due to other circumstances, the House Appropriations Committee (HAC) and the Senate Finance and Claims Committee (S&FC) were unable to set aside the time necessary for the second and third tiers. However, we are proposing once again that this training be conducted, and that time be set aside in the regular subcommittee schedules.

The division proposes to present training in three tiers.

- 1) Training for all new legislators. This training was provided to new legislators during orientation in November following the caucuses. The division is once again on the orientation schedule to provide this training.
 - a. Duration one hour
 - b. High level training on terms and concepts likely to be encountered and that all legislators need to know
 - c. Subjects covered
 - i. The Legislative Fiscal Division services and products
 - ii. Appropriations and the legislative role and powers (including balancing the budget)
 - iii. Fund types, and how they are different and why they are important
 - iv. Sources of revenue, and avenues and levels of appropriation (HB 2 and cat and dog appropriations)
 - v. Appropriations bills versus bills with fiscal impacts, and fiscal notes
 - d. Scheduling required – Currently in the orientation schedule.
- 2) Training for all new members of HAC and Senate Finance – open to any other members. It is imperative that new members of HAC and SF&C have grounding in concepts that will be continually encountered throughout the session. Providing this training at the start of the session ensures a higher efficiency in subcommittee and aids in retention. It

must also be recognized that some new members of the committees will not have attended the orientation sessions in November.

- a. Provided during the first week of session
 - b. Duration one to two hours
 - c. Subjects covered
 - i. Appropriations and how the budgeting system works (refresher)
 - ii. Fund types (refresher)
 - iii. Subcommittee structure and role
 - iv. HB 2 structure and purpose
 - v. HB 2 through the session
 - vi. Structure of budgets (personal services, etc)
 - vii. Decision packages/present law/new proposals/base
 - viii. Using the budget analysis
 - d. Scheduling required – Committee leadership, as well as subcommittee chairs, need to schedule time during the first week of session for this training.
- 3) Training for all members of HAC and Finance. This session would cover more advanced subjects and concepts in budgeting, including powers and limitations of HB 2, and how to make most effective use of both. In addition, this session would include a summary by LFD subcommittee staff of the major issues in each area of the budget. The purpose of this summary is to provide members with an increased perspective of the issues facing other subcommittees, and consequently of the entire budget.
- a. Provided during the first week of session or beginning of second week
 - b. Duration two hours, more if needed
 - c. Subjects covered
 - i. Constitutional basis and requirements
 - ii. Language and other legal issues
 - iii. The interim and how impacted by legislative action and vice versa
 - iv. Companion bill(s) and HB 2 narrative
 - v. General fund status
 - vi. Overview of major issues in all areas by LFD staff (provision of perspective on the entire budget)
 - d. Scheduling required – Committee leadership needs to schedule time, coordinated with subcommittee chairs, for this training.